

Shaping the Future Water Agenda

Report Launch Webinar

March 20, 2025

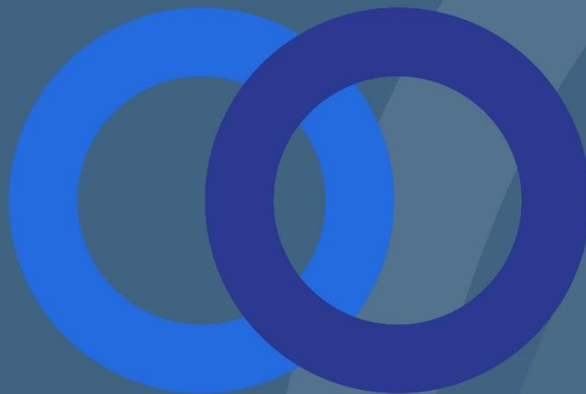


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Agenda

1. Program background
2. Key takeaways from program research
3. 5 shifts for corporate water stewardship
4. Panel discussion
5. WWF approach going forward



Session Speakers – Session #1



Jason Walters

Director
GlobeScan



Alexis Morgan

*Global Water
Stewardship Lead*
WWF



Mina Guli

Founder & CEO
**Run Blue & Thirst
Foundation**



Saqib Sohail

*Lead – Responsible
Business Projects*
Artistic Milliners

Program Objectives

1. Build a deeper understanding of perspectives on water issues
2. Clarify and inform sector roles and engagement for water across the value chain
3. Integrate and elevate water in sustainability strategy and programs
4. Unlock more impactful narratives and ways of framing water for various stakeholders



The Water Agenda Corporate Partners



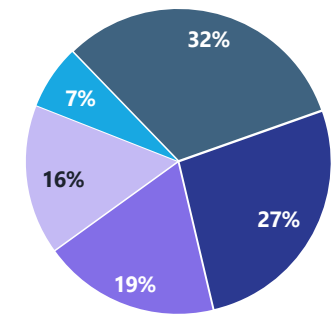
Global Public Opinion Research (n=30,000)



R24_particip_map

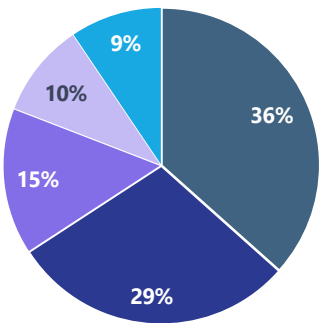
Expert Stakeholder Research (n=352)

Sectors



- Corporate
- NGOs & Foundations
- Consulting / Other services
- Academia/Research / Think Tanks
- Government & MLOs

Regions



- Europe
- North America
- Asia-Pacific
- Africa / Middle East
- Latin America

Key Takeaways from Program Research Findings

INSIGHT 1: There is strong, growing interest and a public appetite for action on water, with an emphasis on water quality.



Water-related issues are very serious problems for the global public and experts.

Water pollution ranks highest for people; climate change and nature loss are the top issues for experts.

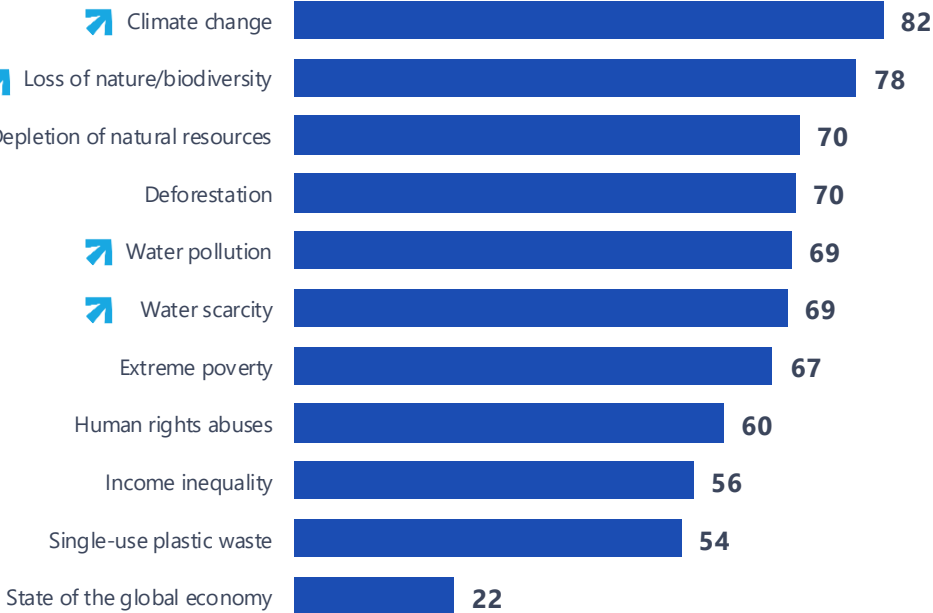
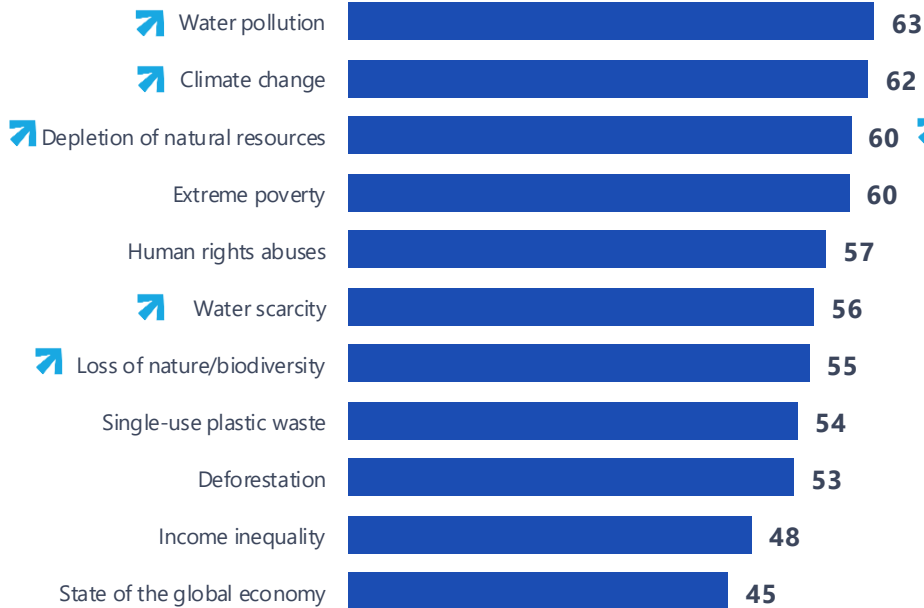


Perceived Seriousness of Global Problems

 Water-related issues

Public Insights: “Very Serious,” Average of 31 Countries, 2024

Expert Insights: “Very Serious,” All Experts, 2024



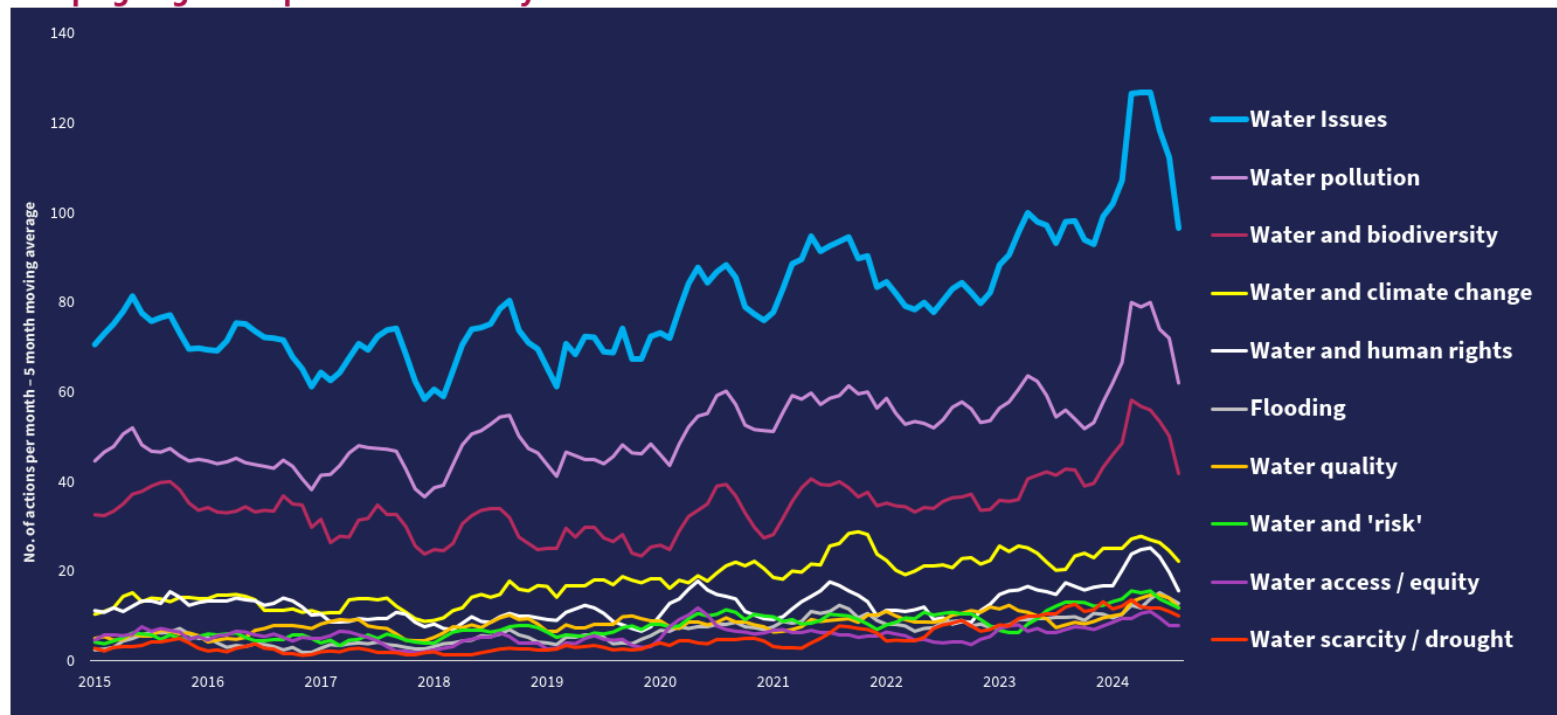
T1. For each of the following possible *global* problems, please indicate if you see it as a very serious, somewhat serious, not very serious, or not at all serious problem.

Q1. We would like to better understand your views on global problems. *Please indicate if you see the following as a very serious, somewhat serious, not very serious, or not at all serious problem.*

NGO campaigning on water is increasing and most often linked to pollution and biodiversity.

How do NGOs prioritise major sub-topics within campaigning on water?

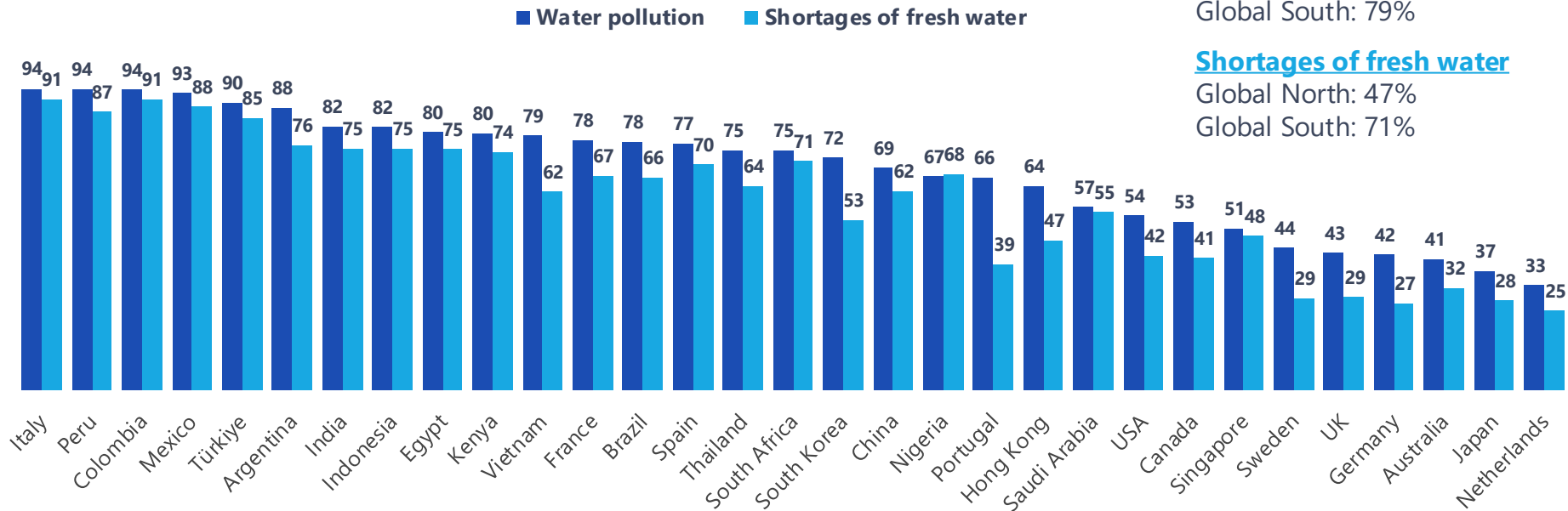
Campaigning sub-topics in water – 10 year view



People in nearly every country feel more affected by water pollution than by water shortages, with higher levels in the Global South.

Extent Personally Affected by Water Issues – Public Opinion/Consumers

“Greatly” and “Moderately Affected,” by Country, 2024



INSIGHT 2: Companies face, substantial growing water issues and risks.

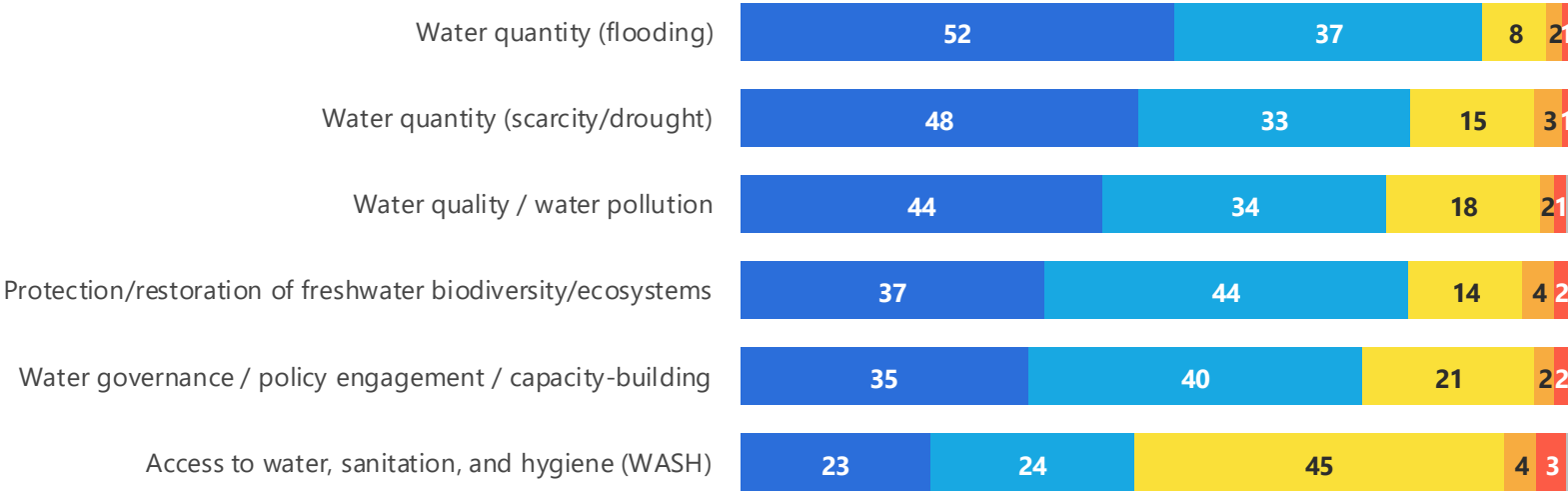


Majority of experts see water quantity, quality, and biodiversity/ecosystems becoming more important in the next 3–5 years.

Perceived Importance of Water Issues

All Experts, 2024

■ Much more important ■ Somewhat more important ■ No change ■ Somewhat less important ■ Much less important ■ Don't know



INSIGHT 3: Sustainability must break free from siloes and adopt more integrated approaches to water, climate, and nature that advance resilience and adaptation.

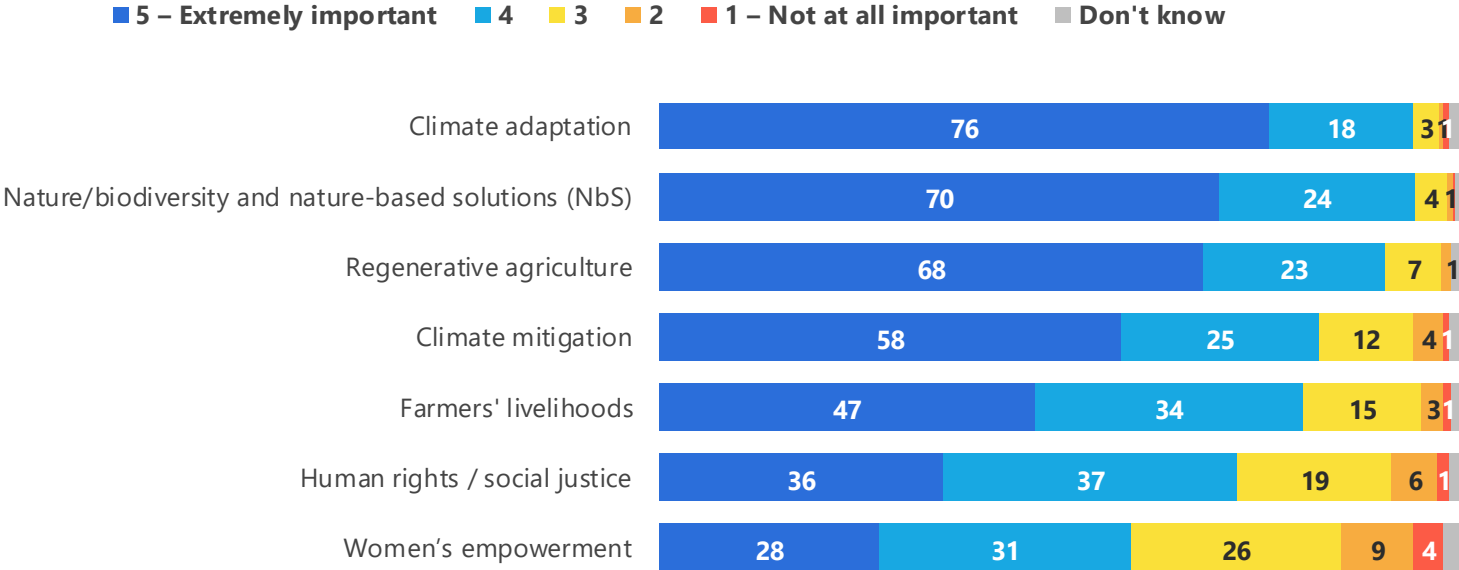


Over two-thirds of experts feel it is extremely important to integrate water stewardship into sustainability initiatives for climate adaptation, nature, and regen. agriculture.

The Water Agenda

Integrating Water Stewardship into Corporate Sustainability

All Experts, 2024



INSIGHT 4: Corporate water stewardship activities and performance diverge from what the public and experts want to see from companies.

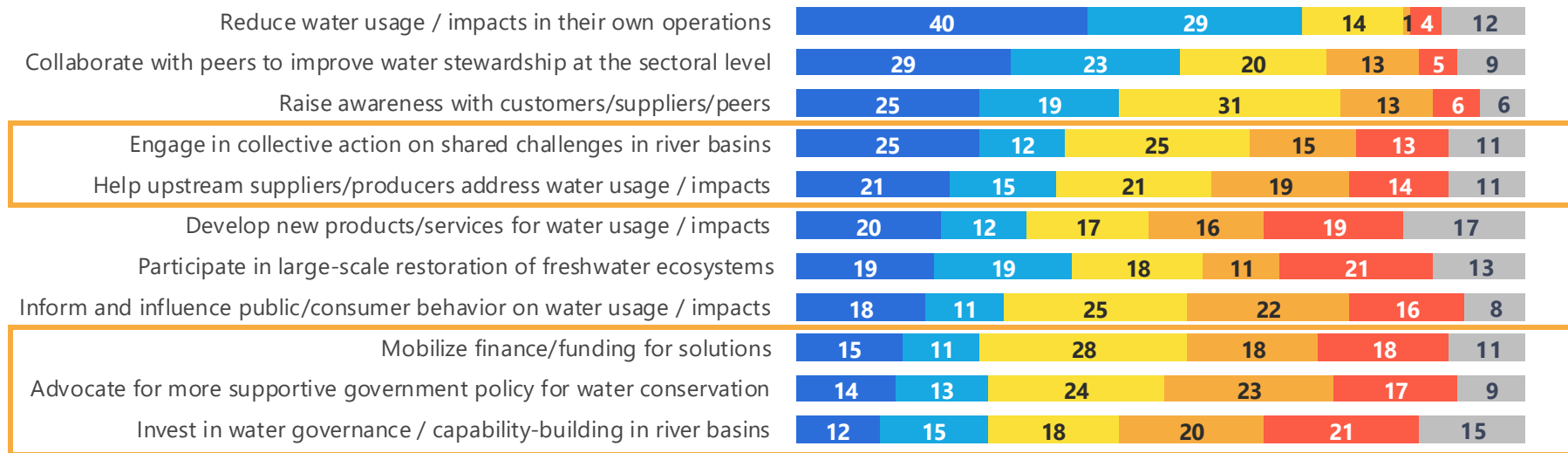


The most prevalent corporate water stewardship approaches include reducing own water usage, collaborating at the sector level, and raising awareness.

Company's Water Stewardship Approaches

Subsample: Companies / Private Sector, 2024

■ 5 – A great deal ■ 4 ■ 3 – Somewhat ■ 2 ■ 1 – Not at all ■ N/A



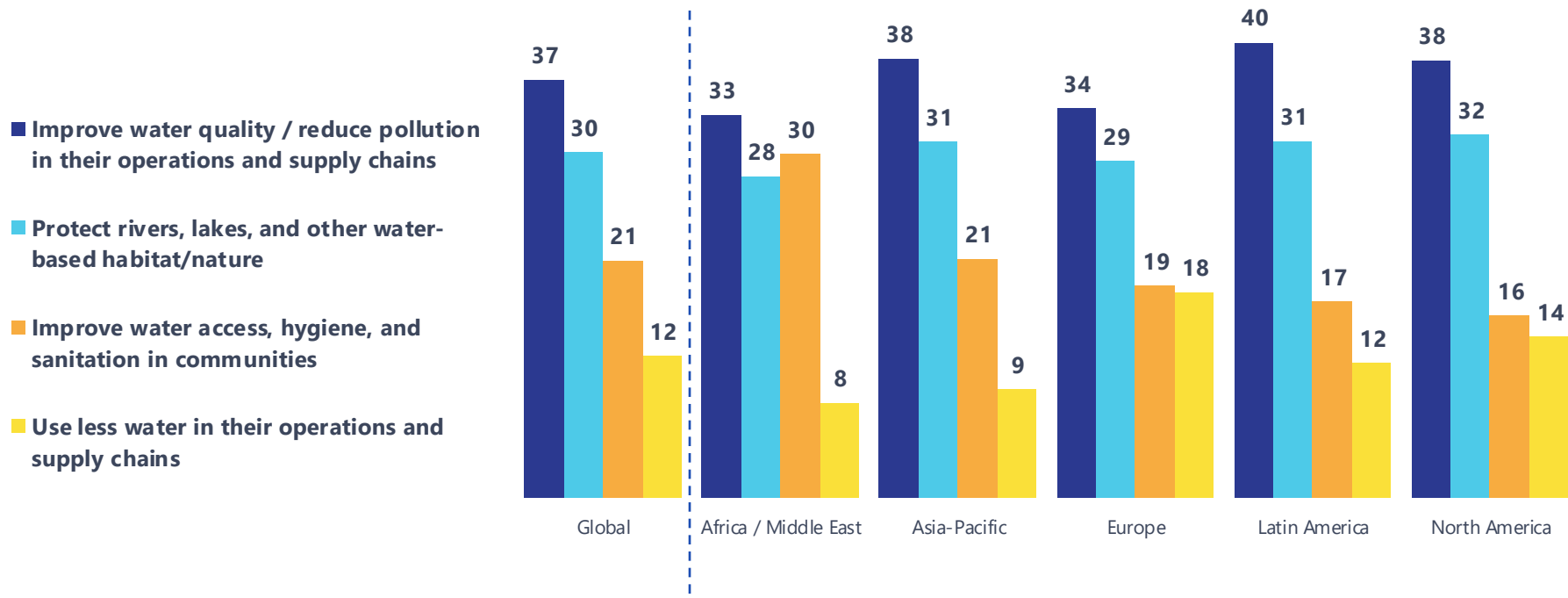
Sample size: n=95



"Improving water quality/reduce pollution" and "protect rivers, lakes, habitat/nature" are seen as the most important water goals for companies.

Water-related Goals

Average of 31 Countries and by Region, 2024



Key Takeaways from Program Research Findings

- **INSIGHT 1:** There is strong, growing interest and a public appetite for action on water, with an emphasis on water quality.
- **INSIGHT 2:** Companies face, substantial growing water issues and risks.
- **INSIGHT 3:** Sustainability must break free from siloes and adopt more integrated approaches to water, climate, and nature that advance resilience and adaptation.
- **INSIGHT 4:** Corporate water stewardship activities and performance diverge from what the public and experts want to see from companies.

Five vital shifts for corporate water stewardship

The background of the slide features abstract, overlapping geometric shapes in various shades of blue, creating a modern and dynamic visual effect.

SHIFT 1: Invest in collective action globally and locally, emphasizing public sector collaboration in priority catchments.



Collective action in river basins is seen as the most beneficial way for companies to advance water stewardship.

Most Beneficial Actions for Effective Water Stewardship

All Experts, 2024

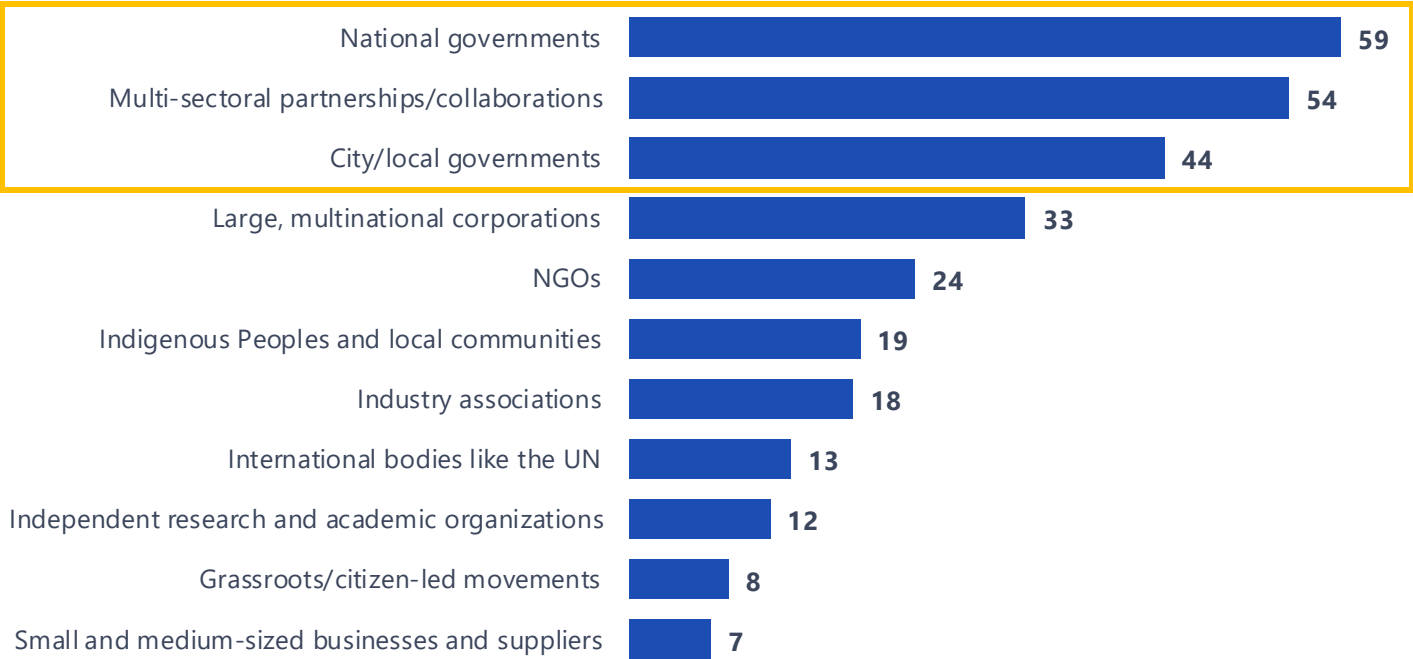


Experts feel national governments and multi-sector collaborations should lead on water stewardship, followed by city/local governments and large multinationals.



Sectors That Should Lead on Water Stewardship

All Experts, 2024



Experts believe that a variety of actions, like more pressure from investors, government policy alignment and incentives, better data, and better use of innovative funding models would help to scale up collective action in river basins.

Drivers for Collective Action on Water Stewardship

All Experts, 2024



For Global South experts, #1 rank goes to "Better integration with policies and regulations (e.g., NAPs, NBSAPs)", far higher than for Global North experts (#6 overall, #9 tie in North America).

SHIFT 2: Prioritize value chain water issues and practices with a stronger focus on flood, drought, and water quality.



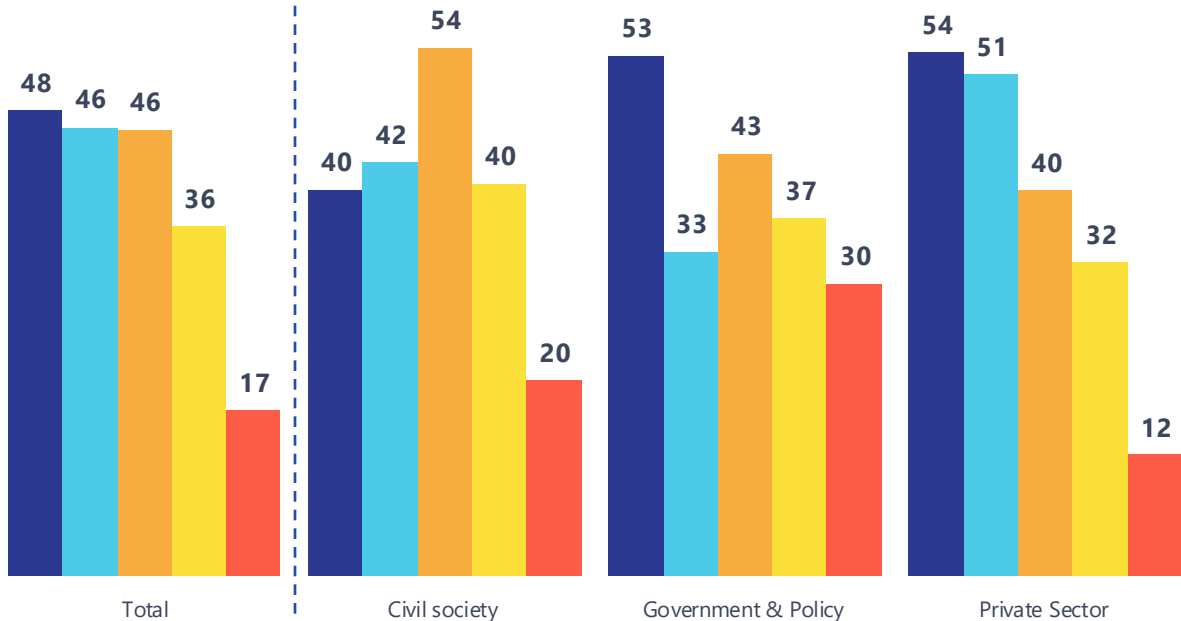
For private sector and civil society experts, the most helpful types of support for suppliers' water stewardship programs are operational and financial, industry alignment, and procurement incentives.

Support for Suppliers' Water Stewardship

All Experts, Total and by Sector, 2024

Industry alignment is considered more helpful in the Global North and North America and by the private sector.

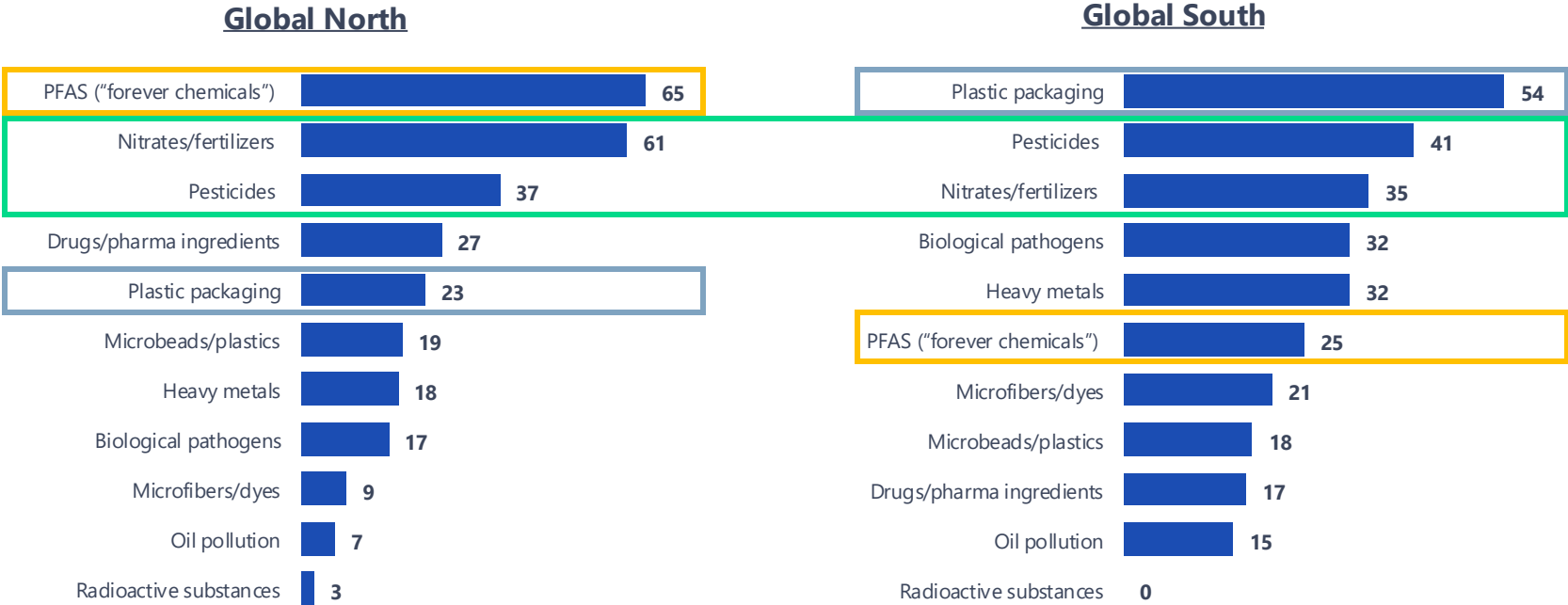
- **Industry alignment**
(consistent reporting standards)
- **Procurement incentives**
(price premiums, supplier recognition)
- **Operational support**
(training, technical support, data provision)
- **Financial support**
(loans, grants)
- **Advocacy support**
(policy engagement, permitting)



Overall, agricultural pollution (nitrates/fertilizers, pesticides) is a high, shared concern in both the Global North & South. In the North, PFAS is the most concerning source of water pollution, while in the South, plastic packaging ranks highest.

Most Concerning Sources of Water Pollution

Global North vs Global South, All Experts, 2024



27 Q3. Of the following sources of water pollution in your country, which are the most concerning in your opinion. Please select up to three.

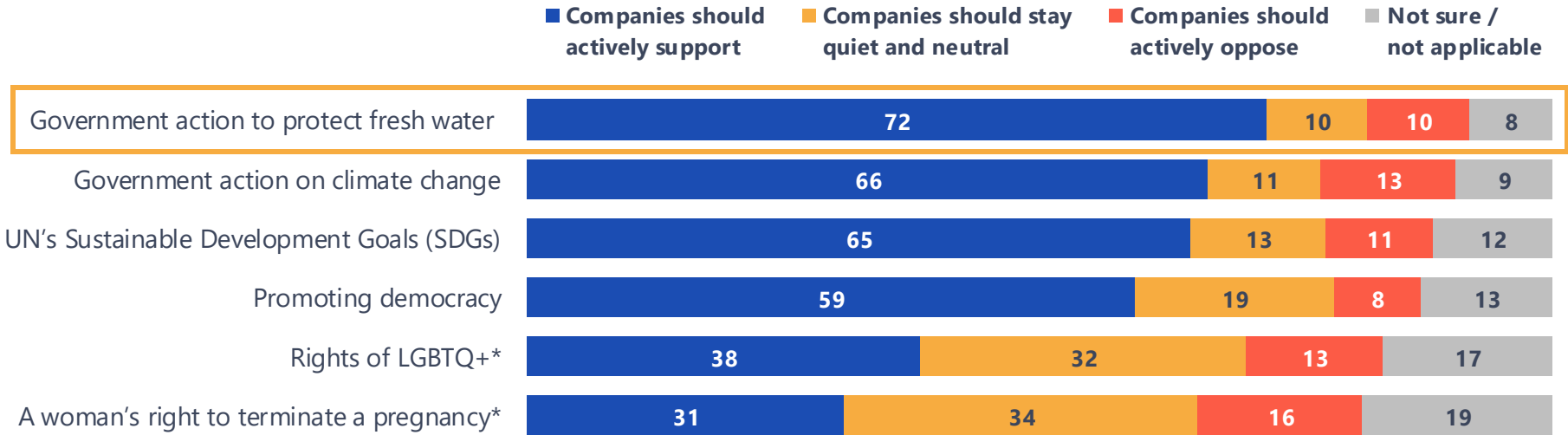
SHIFT 3: Proactively engage in water and nature policy advocacy in a transparent manner, working in collaboration with key organizations and influencers.



Over 70 percent of people say companies should actively support government action to protect fresh water, ahead of climate change and other issue areas.

Expectations for Corporate Advocacy

Average of 27 Countries, 2024

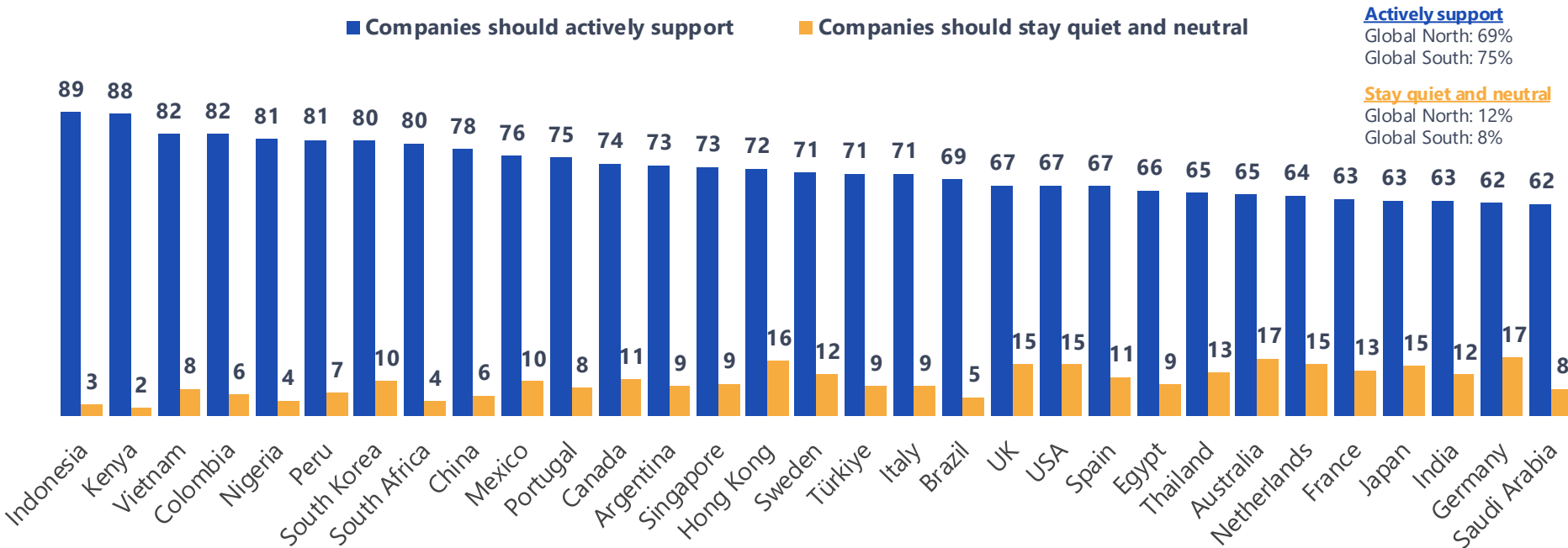


*Not asked in Saudi Arabia, Türkiye, Indonesia, and Egypt.

In all countries, people strongly favor companies actively supporting government action to protect fresh water over staying quiet and neutral

Expectations for Corporate Advocacy on Government Action to Protect Fresh Water

“Companies Should Actively Support” and “Stay Quiet and Neutral,” by Country, 2024



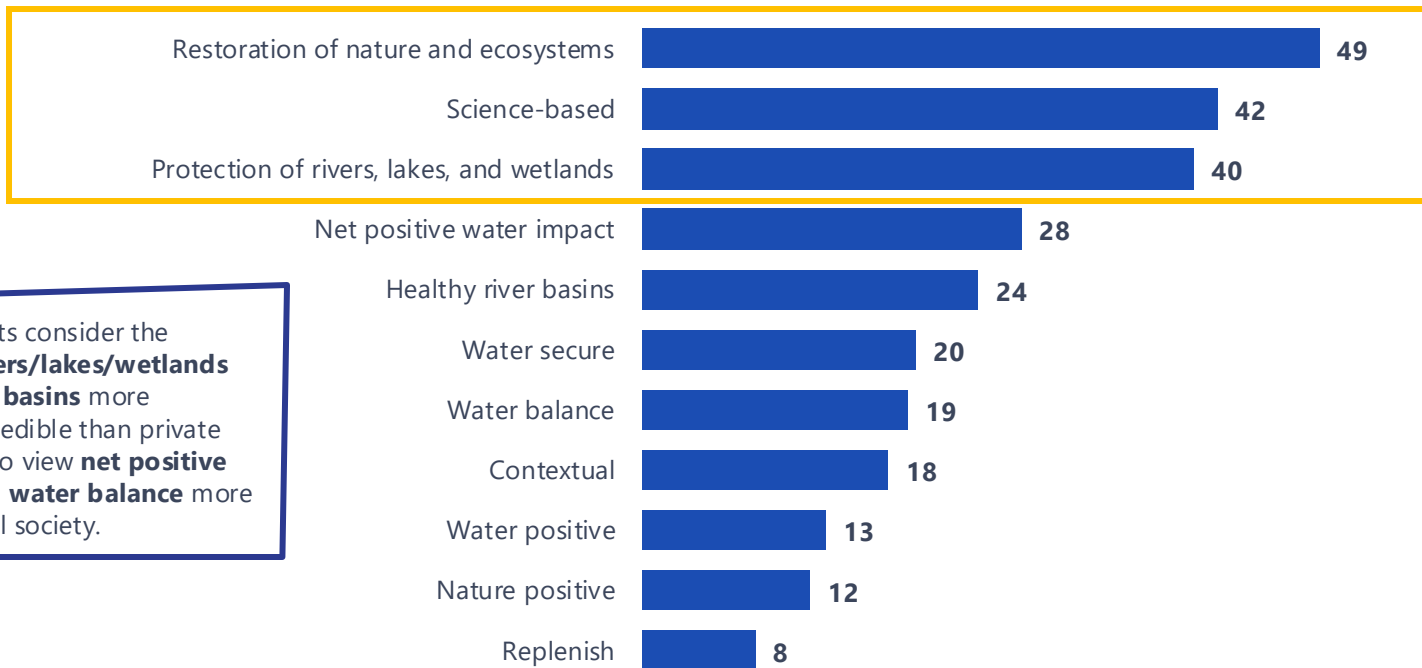
SHIFT 4: Position water stewardship as a connector and solutions space for more integrated, effective approaches to climate, nature and other sustainability priorities.



Nature restoration, science-based, and protecting rivers/lakes/wetlands are considered the most meaningful and credible terms for water stewardship targets. Equally, “water/nature positive” and “replenish” lack meaning/credibility.

Water Stewardship Targets

All Experts, 2024



Civil society experts consider the **protection of rivers/lakes/wetlands** and **healthy river basins** more meaningful and credible than private sector experts, who view **net positive water impact** and **water balance** more favorably than civil society.

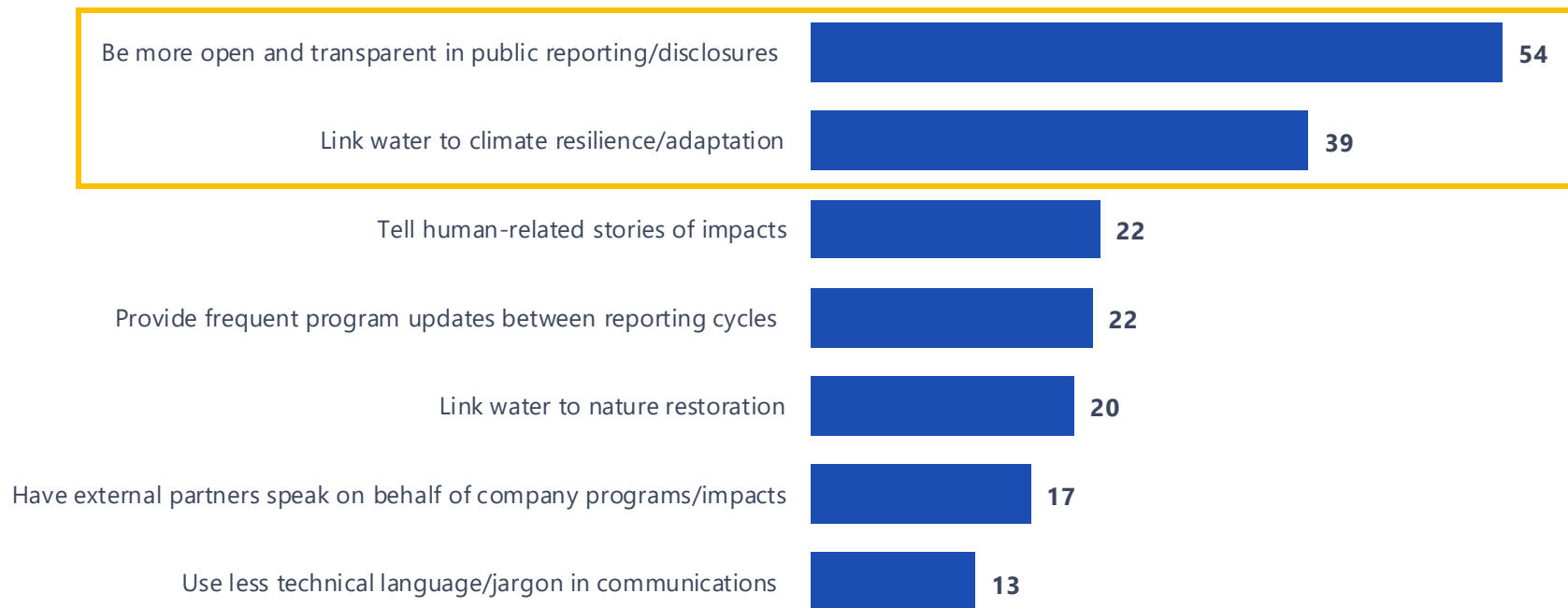
SHIFT 5: Embrace disclosure and more relatable, compelling comms. and engagement, while avoiding jargon like water positive and reconsidering both water quality and rivers/wetlands.



Experts want companies to be more open and transparent in public reporting and to link water more to climate, people, and nature.

Corporate Communications on Water Stewardship

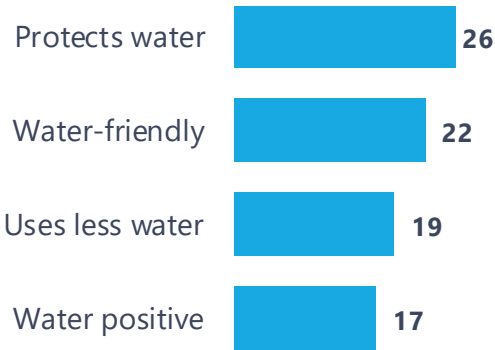
All Experts, 2024



Defining an Environmentally Responsible Company – Public Opinion/Consumers

Average of 7 Countries,* 2024

“Protects water” is the most selected water-related term

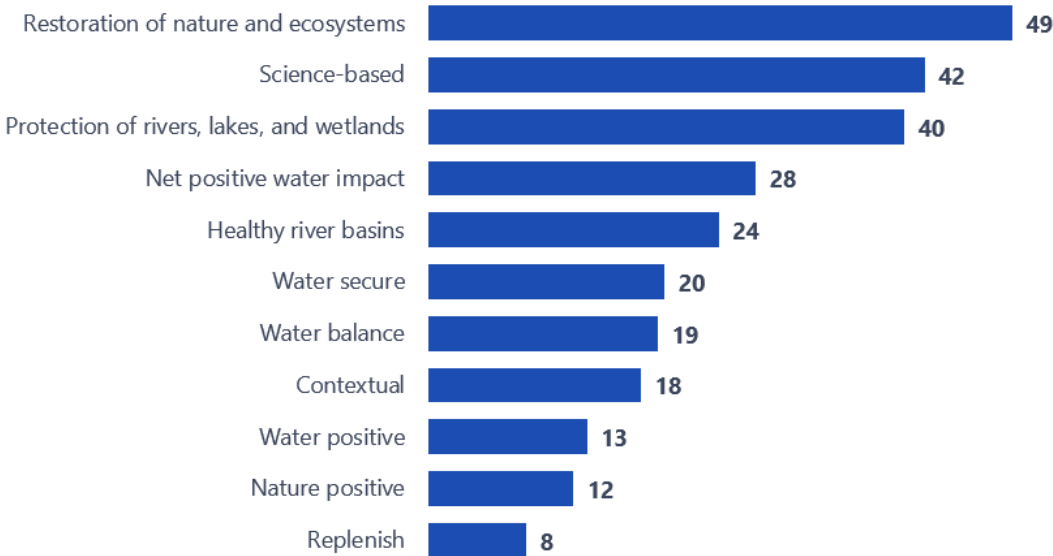


*Asked in UK, Canada (English), US, India, South Africa, Singapore, and Hong Kong (English).

T72. Which of the following best describes the meaning of an “environmentally responsible” company for you? Please choose up to five.

Water Stewardship Targets

All Experts, 2024



Q14. Of the following terms and/or concepts that companies can use to describe their water stewardship targets, which ones do you believe are most meaningful and credible? Select up to three.

Summary: Five vital shifts for corporate water stewardship

- **SHIFT 1:** Invest with time and money in **collective action** at the global and local scales, emphasizing cross-sectoral action with the public sector in priority catchments
- **SHIFT 2:** Prioritize **value chain** water issues and practices with a stronger focus (consider revisiting your risk assessments) on flood, drought - not just scarcity - and water quality
- **SHIFT 3:** Proactively engage in water and nature **policy advocacy** in a transparent manner, working in collaboration with key organizations and influencers
- **SHIFT 4:** Position **water stewardship as a connector** / solutions space for more integrated, effective approaches to climate, nature and other sustainability priorities
- **SHIFT 5:** Embrace **disclosure** and more relatable, compelling comms. and engagement, while **avoiding jargon** like water positive and reconsidering both water quality and rivers/wetlands

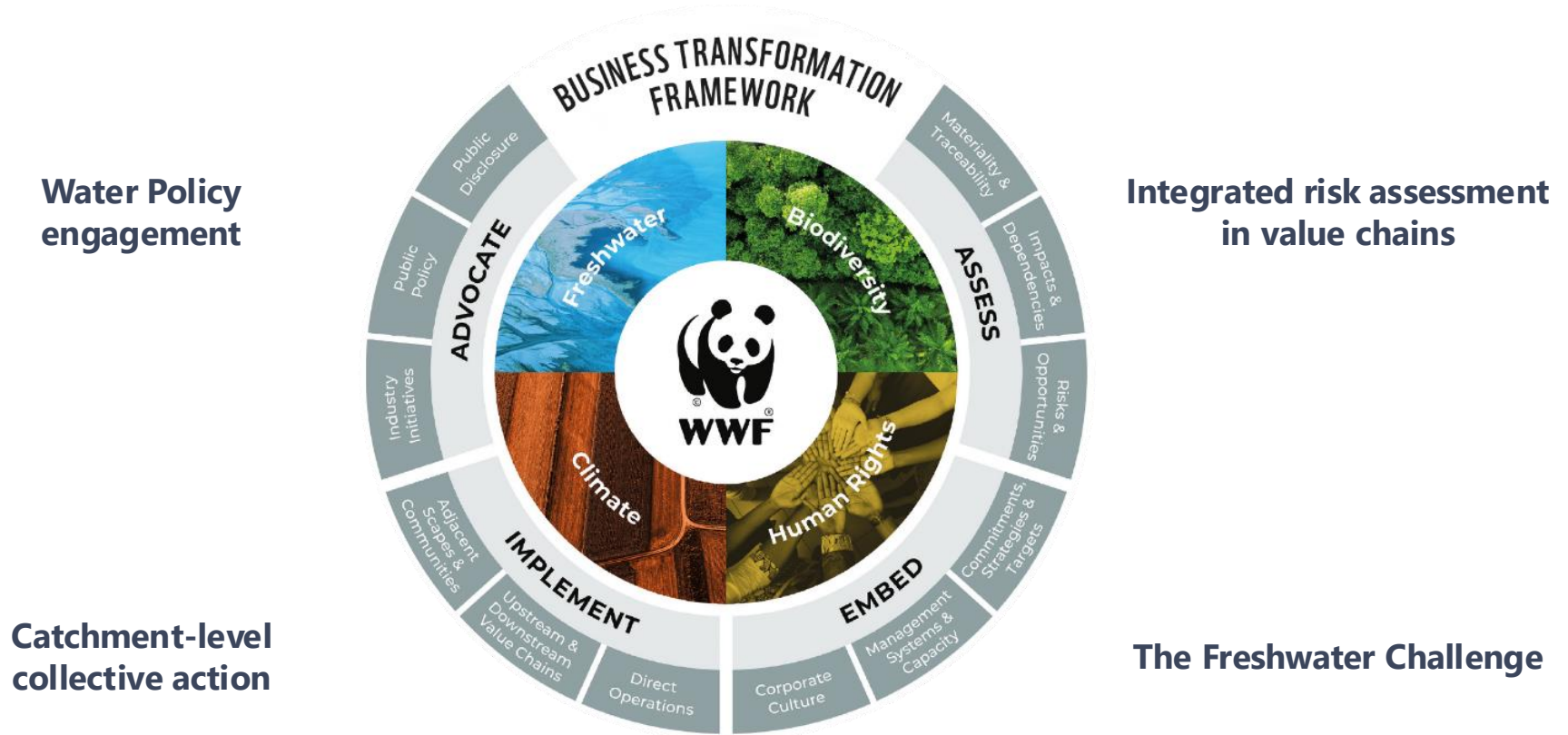
Panel discussion



WWF vision for water stewardship going forward



WWF's plans to advance the future water agenda



Experts believe that a variety of actions, like more pressure from investors, government policy alignment and incentives, better data, and better use of innovative funding models would help to scale up collective action in river basins.

Drivers for Collective Action on Water Stewardship

All Experts, 2024



For Global South experts, #1 rank goes to "Better integration with policies and regulations (e.g., NAPs, NBSAPs)", far higher than for Global North experts (#6 overall, #9 tie in North America).

Q15. Which of the following would most help to scale up collective action on water stewardship in important river basins? *Select up to three.*



Why the Freshwater Challenge is a win-win-win

- The Freshwater Challenge (FWC) gives companies the opportunity to **engage in advocacy** and **demonstrate policy action to the public**
- FWC gives companies & governments the chance to **highlight efforts on “restoration” and “protection of freshwater ecosystems”** – something that was seen as desirable & credible by the public and experts alike
- FWC gives companies & governments the excuse to focus on **wetlands** – which in turn are a nature-based solution that **tackles pollution (top public issue), and flooding (top risk issue from experts)**



Embracing the Freshwater Challenge is fully aligned with the findings of this research.



**Know your world.
Lead the future.**



GlobeScan is a global insights and advisory firm specializing in trust, sustainability, and engagement.

We equip companies, NGOs, and governmental organizations with the insights they need to navigate a rapidly changing world and respond to shifting societal and stakeholder expectations.

We help our clients craft evidence-led strategies that reduce risks and create value for themselves and society.

Our purpose is to co-create a sustainable and equitable future.

Established in 1987, we have offices in Cape Town, Hong Kong, Hyderabad, London, Paris, San Francisco, São Paulo, Singapore, and Toronto. GlobeScan is a participant of the UN Global Compact and a Certified B Corporation.

www.GlobeScan.com | Jason Walters (jason.walters@globescan.com)

WWF is the world's leading conservation organization and works in nearly 100 countries. At every level, we collaborate with people around the world to develop and deliver innovative solutions that protect communities, wildlife, and the places in which they live..

Established in 1961, our mission is to stop the degradation of the earth's natural environment and to build a future in which humans live in harmony with nature by:

- conserving the world's biological diversity
- ensuring that the use of renewable natural resources is sustainable
- promoting the reduction of pollution and wasteful consumption.

www.panda.org | Alexis Morgan (alexis.morgan@wwf.de)